

CS TOURISM SECTOR POST PROFILE FOR COUNTRY: FRANCE

1. VISIT USA COMPONENT (USA)

Date: June 20, 2001

Post contact for tourism sector:

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1.1. Market Trends and Data

The United States remains the top choice among long-haul destinations for French travelers. Since 1985, the number of French tourists to the U.S. has more than tripled and reached more than one million in 1998. France ranks third among the top European markets, after the U.K. and Germany, and sixth in the world after Canada, Mexico, Japan, the U.K., and Germany as an overseas source of income for the tourism industry in the U. S.

The French are highly individualistic in their travel behavior. As a consequence, only 15% will buy travel packages. The average French person visiting the U.S. is aged between 25 and 45 and has an average income of \$ 3,000 per month. Ninety percent of visitors are adults, but families with one or two children have increased over the last five years. The average length of stay is approximately 12-16 days with week end packages being popular during the winter season. The daily visitor spending in the U.S. amounts to approximately \$ 96. Fifty-five percent of visitors come from Paris and its region.

Overall, the U.S. is ranked number one among the long haul destinations, not counting the French Antilles (French Territories), demonstrating the everlasting attraction of the French for seas, beaches and sun, and explaining the popularity of destinations such as Florida and California. As the French are also very fond of culture and history, many French visitors choose cities renowned for their artwork and museums. New York, California, the national parks in Arizona, Nevada, Utah and Florida remain the top choices.

Eleven airlines (Air France, American Airlines, AOM, Continental Airlines, Delta Air Lines, Icelandair, KLM/Northwest Airlines, Tower Air, TWA, United Airlines and US Airways) offer direct flights from Paris/Charles de Gaulle or Orly airports to major U.S. cities: Atlanta, Boston, Charlotte, Chicago, Cincinnati, Dallas, Detroit, Houston, Los Angeles, Miami, Orlando, Minneapolis, Pittsburgh, Philadelphia, New York, San Francisco, San Jose, St Louis, Washington.

The Commercial Service of the Department of Commerce actively promotes U.S. tourism destinations and considers it a priority. Following the closing of the United States Travel & Tourism Administration in 1996, the Commercial Service office in Paris successfully supported the establishment of the Visit USA Committee/France, a private industry association aimed at promoting the United States as a travel and tourism destination. Today,

the Visit USA Committee/France has more than 100 members, including 22 U.S. states and 20 cities, as well as major U.S. airlines, hotel chains, car rental & services companies, theme parks, and tour operators. With the support of the U.S. Commercial Service, the Visit USA Committee organizes promotional activities such as workshops, trade and consumer shows and publishes travel guides for the travel trade industry and the general public.

1.2 CS Tourism Sector Marketing Program

A. FY 2001 – Accomplishments and results

For five years, CS/Paris has been instrumental in the privatization of the Visit USA Committee. Additionally CS/Paris has provided strong logistical and administrative support to their promotional activities. US & FCS France plans to gradually transfer logistical and administrative duties to the Visit USA Committee.

- Trade and Public events activities:

Trade:

Tourism Specialist attended **World Trade Market, Showcase Europe Tier I Event**, which took place in London, on **November 12-15, 2000**. Gail Delrosal, Showcase Europe Coordinator for Travel & Tourism, organized a one day training at the U.S. Embassy in London for all the Overseas Trade Specialists and the TIA, followed by 2 days at World Trade Market. CS France Tourism Specialist set-up appointments with 25 travel trade business contacts (Convention & Visitors Bureau of the main states and cities) in order to promote CS France services for travel & tourism, to present the Visit USA Committee France's activities and to recruit new members.

In collaboration with Delta Air Lines, Chairman of TIA (Travel Industry Association), CS France Tourism Specialist recruited the French delegation composed of 51 buyers and 7 journalists, to attend **Pow Wow Orlando, Showcase Europe Tier I Event**, which took place in **Orlando, Florida, on May 5-9, 2001**. Tourism Specialist met around 40/ 45 travel trade business contacts (Convention & Visitors Bureau of the main states and cities) in order to promote CS France services for travel & tourism, present the Visit USA Committee France's activities and recruit new members.

Public:

- The **Salon Mondial du Tourisme**, the most important tourism consumer show in France (100,000 visitors), took place at **Paris-Expo Porte de Versailles on March 18-21, 2001**. Among the 600 exhibitors, 100 destinations/countries were represented. The USA pavilion was organized by the Visit USA Committee France. CS Paris met with the U.S. exhibitors.
- Press:

CS France Tourism Specialist counseled journalists on an ad-hoc basis.

Trade Specialist provided assistance to “**Bonne Pioche**”, producer of television program “**Détours du Monde**” for the French television cable network “**Voyage**”. Bonne Pioche is planning a two month report on Arizona, Utah and the Rocky Mountains. This channel is dedicated to travel and leisure. The program reaches an audience of 2.5 million viewers in France. Post organized meetings with the local Arizona and Utah Office of Tourism.

Trade Specialist provided assistance to Mr. Yazid Tizi, Producer of **Ushuaïa Nature (Channel TF1)**, a nature documentary series. Ushuaïa Nature is the leading nature and science program in France, with an average audience of 8 million people per show, as well as regular broadcasts on Discovery Channel. Ushuaïa Nature is preparing a documentary on the hawaiian volcanoes on April 2001.

Trade Specialist provided assistance to **Christophe Mercier, free-lance journalist for Grands Reportages, Mer & Océan and Iles, monthly travel magazines**. Mr. Mercier is preparing an extensive issue on Hawaii. Post organized meetings with the Hawaiian Convention & Visitors Bureau and links with the main tour operators in France.

- Assistance to state and city offices in organizing promotional events in France.

- On September 12, 2000, Tourism Specialist organized a breakfast presentation at the Regina Hotel for the French tour operators and the travel trade press, to promote the **Colorado International Marketing Organization**, Vail and Aspen Ski resorts. The event was very successful.
- Tourism Specialist was selected by the Colorado International Marketing Organization to organize **a lunch at the restaurant La Tour D'Argent on November 17, 2001** for the major players of the French travel industry. The guest of honor was Stephanie Foote, Deputy Mayor of Colorado. **The Colorado International Marketing Organization** would like to develop its market in France. They are looking for a representation and they are already in contact with Antilope Communications.
- On April 25, 2001, Tourism Specialist organized a cocktail at the American Consulate for the French tour operators and the travel trade press, in order to promote the **Puerto Rico Tourism Office**.
- On May 16, 2001, Tourism Specialist organized a lunch at the American Consulate for the French tour operators and the travel trade press, in order to promote **the San Jose Convention & Visitors Bureau** (California). The event was sponsored by American Airlines.
- On June 12, 2001, Tourism Specialist organized a lunch at the American Consulate for the French tour operators and the travel trade press, to promote the **Lee Island Coast Convention & Visitors Bureau (Florida)**. The event was sponsored by Delta Air Lines.

- Research:

CS France Tourism Specialist prepared:

ISA: Travel & Tourism Services (will be completed in July 2001)

IMI's:

- Who's Who 2001
- Media Guide 2001
- Tourism Infrastructure 2001

- Publications:

- . Welcome to the French market
- . Statistics on the French Travel market
- . Air Services Analysis France 2001
- . Festivals USA 2001 (2002 will be completed in September 2001)

For distribution to any U.S. visitor, at Pow Wow USA, WTM/London, Top Resa, Salon Mondial du Tourisme and also to the French business contacts.

- Success Stories :

1) Arizona Office of Tourism, Phoenix, AZ

In November 20, 1999, CS France Tourism Specialist met Christèle Garoutte, producer of Bonne Pioche, which produces a TV program called "Detours du Monde" on the French TV cable channel Voyage, a channel dedicated to travel & tourism. The program is aired daily and is very popular, with an audience of 2.5 million viewers in France. Every Friday, the program is dedicated to the United States, especially the Southwest and to America's national parks. Following an extensive counseling session at CS Paris, the producer contacted the Arizona Office of Tourism to send a journalist to conduct interviews throughout the State of Arizona.

As a result of this counseling session and the journalist's meetings in Arizona, Voyager programmed two presentations of thirty minutes each on the State of Arizona, that aired on March 30 and April 6, 2001. The approximate advertising value of such a program on a major travel and tourism TV channel in France is \$ **180,000**.

2) Montana Tourism Division, Helena, MT

In November 20, 1999, CS France Tourism Specialist met with Christèle Garoutte, producer of Bonne Pioche, which produces a TV program called "Detours du Monde" on the French TV cable network Voyage. Voyage is a channel dedicated to travel & tourism. The program is very popular, with an audience of 2.5 million viewers in France. It is aired every day at 5:55 p.m. Every Friday, the program is dedicated to the U.S., especially to the Southwestern states and the national parks (Arizona, Utah, Montana, and Wyoming in particular). Following an extensive counseling session at CS Paris, the producer contacted the Montana Travel Promotion in order to send a journalist to conduct interviews throughout the State of Montana.

As a result of this counseling session and the journalist's meetings in Montana, Voyager programmed a thirty-minute presentation on the State of Montana, that aired on March 2,

2001. The approximate advertising value of such a program on a major travel and tourism TV channel in France is **\$ 90,000**.

3) Utah Travel Council, Salt Lake City, UT

In November 20, 1999, CS France Tourism Specialist met Christèle Garoutte, producer of Bonne Pioche, which produces a TV program called "Detours du Monde", for the French TV cabled network Voyage. Voyage is a channel dedicated to travel & tourism. The program is very popular, with an audience of 2.5 million viewers in France. It is aired every day at 5:55 p.m. Every Friday, the program is dedicated to the U.S. , especially to the Southwestern states and the National Parks. Following an extensive counseling session at CS Paris, the producer contacted the Utah Travel Council to organize a visit by one of the cable channel's journalists to conduct interviews throughout the State of Utah.

As a result of this counseling session and the journalist's meetings in Utah, Voyager programmed two presentations of thirty minutes each on the State of Utah, aired March 16 and March 23, 2001. The approximate advertising value of such a program in a major travel and tourism French TV channel is **\$ 180,000**.

4) Wyoming Business Council – Division of Tourism, Cheyenne, WY

In November 20, 1999, CS France Tourism Specialist met Christèle Garoutte, producer of Bonne Pioche, which produces a TV program called "Detours du Monde" on the French TV cable network Voyage. Voyage is a channel dedicated to travel & tourism. The program is very popular with an audience of 2.5 million viewers in France. It is aired every day 5 minutes at 6:00 p.m. Every Friday, the program is dedicated to the U.S. , especially to the at 5:55 p.m. Southwestern states and the National Parks (Arizona, Utah, Montana, and Wyoming, in particular). Following an extensive counseling session at CS Paris, the producer contacted the Wyoming Division of Tourism to send a journalist to conduct interviews throughout the State of Wyoming.

As a result of this counseling session and the journalist's meetings in Wyoming, Voyager programmed a thirty- minute presentation on the State of Wyoming, which aired on March 9, 2001. The approximate advertising value of such a program on a major travel and tourism TV channel in France is **\$ 90,000**.

5) Nasdaq MarquetSite, New Milford, NJ

In March 2000, CS France Trade Specialist participated in ITB Berlin, Europe's foremost trade show in the travel and tourism sector, and a Showcase Europe Tier I Event, in order to promote CS France travel & tourism services and to recruit new members for the Visit USA Committee France. At the event, the specialist conducted a counseling Nasdaq MarquetSite, a New Milford (NJ) based company. Operating from Times Square in New York City, this firm offers access to the stock market, using the latest technological advances, to New Yorkers and visitors. In June 2000, CS Paris conducted a Gold Key Service for the company. Three appointments were made with major French tour operators to place Nasdaq MarquetSite in their brochures as a destination (Nouvelles Frontières, Voyageurs aux Etats-Unis, and Artours). As a result of this counseling session, Nasdaq MarquetSite recorded sales valued at **\$ 800** .

6) Amtrak, Seattle, WA

CS France Tourism Specialist attended POW WOW, the U.S.'s largest tourism promotion event and a Showcase Europe Tier I Event, which took place in Dallas, Texas, May 13-18,2000. As a result of a counseling session with the Marketing Director of Amtrak, in which the commercial specialist promoted CS France travel & tourism services, Amtrak joined the Visit USA Committee France, the main organization in France promoting U.S. destinations.

7) American Pathway, Washington, D.C.

TS organized a press conference for the Deputy Assistant Secretary of Commerce for Tourism Industries, held in November 1999 at the Sofitel Hotel Arc de Triomphe, to promote "American Pathways 2000." Part of the White House Millennium Project, "American Pathways 2000" is a program created by the Department of Commerce's Office of Tourism Industries. Its goal is to preserve U.S. historic and cultural resources for future generations and expand urban and rural economic development opportunities through the promotion at home and abroad of selected "historic itineraries." As a result of CS Paris' support and intervention, a one-page presentation on American Pathways 2000 appeared on-line for two months in Seniorplanet.fr, an on-line magazine dedicated to travel and leisure. The issue reached an audience of 48,000 viewers and the resulting article represents an approximate advertising value of \$ 4,000.

8) Colorado International Marketing Organization, Denver, CO

In September 2000, CS France TS organized a breakfast presentation at the Regina Hotel in Paris for the Colorado International Marketing Organization, the Denver International Airport and the Aspen & Vail Ski Resorts. The purpose of the event was to raise awareness of Colorado destinations and seek coverage in the French travel press. The event attracted major tour operators and representatives of the French travel trade press.

As a result of this promotional event, "Le Quotidien du Tourisme," one of France's major travel trade magazines, published an article dedicated to the main ski resorts in Colorado. The approximate advertising value of such an article was valued at \$ 4,000.

9) Colorado International Marketing Organization, Denver, CO

In September and November 2000, TS organized several events in Paris for the Colorado International Marketing Organization, the Denver International Airport and the Aspen & Vail Ski Resorts. The purpose of the events was to raise awareness of Colorado destinations and seek coverage in the French travel press. The events attracted major tour operators and representatives of the French travel trade press. Attendees at these events included major French tour operators and American airline representatives in France. Due to these promotional events, Jet Set (one of the largest French tour operators) and United Airlines joined forces to establish a combined package for major ski resorts in Colorado. As a result of this effort, Jet Set was able to sell \$ 20,000 worth of services for travel to the United States, to the benefit of the State of Colorado.

- Website:

A tourism section has been implemented in the CS/France website (<http://www.amb-usa.fr/fcs>). The U.S. state tourism sites and the contacts of the members of the Visit USA Committee/France have been listed. CS website has been connected to the Visit USA Committee website since September 2000.

CS/Paris also has an automatic telephone service that takes care of all incoming calls for the public (30,000 in 2000) which refers the caller to the Visit USA Committee and gives out basic travel information

B. Next FY 2002 planned program:

- Trade and public events :

These events will be organized by the Visit USA Committee. The Commercial Service will support these trade and public events.

* Top Resa in Deauville – September 20-22, 2001

In collaboration with CS Paris, the Visit USA Committee is organizing a U.S. pavilion. To date, CS Paris has recruited 11 U.S. exhibitors.

* Salon Mondial du Tourisme in Toulouse – March 1-3, 2002

* Mahana consumer show in Lyon - March 8-10, 2002

* Salon Mondial du Tourisme in Paris - March 14-17, 2002

This public show has an attendance of 100,000 visitors.

In collaboration with CS Paris, the Visit USA Committee would like to organize a U.S. pavilion.

- Research:

ISA : Travel & Tourism Services 2001 (completed on July 31, 2001)

IMI's:

- French Media Guide 2001
- Who's Who 2001
- Air Services Analysis 2001

1.3 Visit USA Committee

A. Structure :

A non profit association created in 1996 and with over 100 members. It is managed by an elected executive committee of 6 to 8 members representing all sectors of the tourism industry. The Visit USA Committee is a member of the NTO (National Tourism Organization). With the collaboration of the Commercial Service/American Embassy Paris, the Visit USA Committee organizes promotional events such as workshops, trade & consumer shows and publishes several travel guides available to the travel trade and the general public.

Headquarters :

Visit USA Committee

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Sub-committees have been created to ensure the satisfactory outcome of the Association's various projects for which all members of the Executive Board will share their experience and know-how:

Trade & Consumer Shows:

Christine FLUHR, Pierre ANTAS

Computer Science & the internet:

Frank VORAGEN, Pierre ANTAS

Training Seminars:

Guillaume ACOLAS

Information Center & Staff Management:

Christine FLUHR, Vincent CORDIER

To assist the general public in search of information, the USA Committee/France is at their disposal through its Information Center, which is open: **Monday to Friday from 1 p.m. to 5p.m.** (no telephone/fax/mail enquiries).

The Information Center was created, thanks to all the members but more particularly with the helpful cooperation of the AVA Insurance Company, which put part of its premises at the disposal of the Visit USA Committee/France.

Address for the Public:

In October 1998, the Visit USA Committee opened an information center for the consumer, located in the street level office of AVA, a Committee member that offered the space.

Information Center

VISIT USA COMMITTEE/France

24, rue Pierre Semard

75009 PARIS

Subway station: Cadet or Poissonnière.

N.B: *The Information Center does not replace the United States Travel & Tourism Administration that was closed in April 1996. It distributes a great amount of its' members brochures, but does not, in any way, claim to be a general U.S. information center.*

B . Activities: The Visit USA Committee/France participates in various travel trade and consumer shows : Top Resa, Salon Mondial du Tourisme, Mahana. They organize an event at Pow Wow USA for the French delegation and the members of the Committee. They publish a monthly press-release which is mailed to over 400 journalists.

The Visit USA Committee maintains one website (**www.visitusafrance.com**) and two Minitel sites (3615 USA and 3617 USATOURISME).

C. Publications: The Visit USA Committee produced a VUSACOM directory, and a “Carnet d’Adresses”. Brochures are distributed through a mailing house and are available in the Information Center.

D. The Visit USA Committee activities depend on the goodwill and availability of its volunteer members and the support of CS/France. The close partnership, between the private and public sectors, that has been established over the last four years has been essential for the development of those activities. The participation of the Commercial Service is the guarantee of the neutrality of the association that has been created to promote the United States as a tourist destination. CS France Tourism Specialist has actively recruited new members for the Visit USA Committee during international trade shows, including ITB and Pow Wow.

E. Comments: CS France Tourism Specialist recognizes the essential role of the Visit USA Committee/France in promoting travel to the U.S. and the importance of close cooperation with the Visit USA Committee to develop synergies in promoting the U.S. travel and tourism industry on the French market. It will support the Visit USA Committee/France on the various event programs. The recent hiring, by the Visit USA Committee, of a permanent employee to perform administrative duties, has clarified our relationship and will enable CS tourism specialist to focus on other projects.

1.4 Support for POW WOW

- A. CS France is a member of the Pow Wow International Advisory Committee.
- B. CS France Tourism Specialist participated for several years as the CS/France/Visit USA Committee representative. Tourism Specialist participated in the market update sessions, the Get Together party for the French delegation and the U.S. exhibitors, and the Worldwide Visit USA Committees meeting organized by TIA.
- C. Pow Wow participation is a must, so as to become acquainted with the U.S. market, to meet with new-to-market destinations a/o suppliers and to work closely with TIA and the Visit USA Committees.

1.5 Barriers to travel

None (visa waiver)

1.6 Suggestions/comments

We need to update the Showcase Europe web site.

II. INFRASTRUCTURE COMPONENT

2.1 Post Participation in Infrastructure

- A. OPT OUT: CS France has opted out of the tourism infrastructure program in 1999 and 2000. Infrastructure market is practically non existent, due to strong French competition.
- B. CS France helped with the recruitment for ITIC 1999, and will be available to promote and recruit a French delegation to ITIC 2002. Either Olivier Collette, Director of Services or Victor Bellelis, Director of the Logistics Unit, as well as the construction industry will be in charge of the project.

2.2 Country's Infrastructure Status

Please find enclosed at the end of this report an IMI completed in June 2001 on the French Tourism Infrastructure Status.

2.3 CS T & T Infrastructure Program

A. Current FY accomplishments and results

Post is waiting for additional information regarding on-going projects in the Charente Maritime's region.

B. Next FY planned program: CS France helped with the recruitment for ITIC 1999, and will be available to promote and recruit a French delegation to ITIC 2002. Victor Bellelis, Director of the Logistics Unit, and of the construction industry specialist will be in charge of the project (or Olivier Collette, Director of Services).

2.4 Comments: N/A

IMI: TOURISM INFRASTRUCTURE'S PROFILE IN FRANCE

I. ECONOMIC ENVIRONMENT:

Geographically, France is the largest country in Europe, outside the former Soviet Union. It has an area of approximately 220,000 square miles and 60 million inhabitants. It is the ninth largest trading partner of the United States, in terms of two-way trade, and the third largest in Europe, after the United Kingdom and Germany. France has the world's fourth biggest industrial economy, with an annual GDP of approximately one-fifth that of the United States. The disposable income of France's population averages \$20,000 per capita. In addition, France's memberships in the G-7, European Union, World Trade Organization and OECD confirm the status of France as a leading economic player in the world. The outlook for 2001 is for continued growth. As a spur to create jobs, plans to implement a reduction of hours worked from 39 to 35 hours per week have been put in place. The new workweek officially came into effect on February 1, 2000 for medium to large firms.

In general, the commercial environment in France is favorable for sales of U.S. goods and services. Marketing products and services in France is almost like marketing them in the U.S., notwithstanding some significant differences in cultural factors and legal restrictions.

Ensuring that France's investment climate is attractive to foreign investors is a priority for French government officials, who see foreign investment as a way to create jobs and stimulate growth. Investment regulations are simple. In addition, there is a range of financial incentives available for foreign investors. The investment promotion agency, DATAR, working both in France and through agencies around the world, provides active and extensive assistance to potential investors. Foreign investment represents a significant percentage of production in many sectors. Foreign investment has been growing at a considerably higher rate than that of the economy as a whole. U.S. investment has been growing at an even faster rate than total foreign investment.

FRENCH MARKET PROFILE

France is the top tourist destination in the world. There were 73 million visitors in France in 1999. The French Ministry of Tourism recently announced a 16 % budget increase for 2001, up from the total tourism promotion budget of \$ 70 million in 1998. Maison de la France has received a total budget of \$ 25 million in 2001 (+3,8 %), and AFIT (Association Française de l'Ingénierie Touristique) \$ 529,000.

Nevertheless, the tourism market in France is not as large as it could be due to general factors: the high price of lodging, the relatively poor quality of offerings and services, and generally limited knowledge of foreign languages by many French people. Efforts to provide a better level of hospitality to tourists are taking place region by region.

France offers a great variety of scenery that meets the needs of almost any tourist: not only beaches, mountains, beautiful countryside, but also historic and cultural attractions. There are 40,000 official historical sights in France, and 40,000 religious monuments. Paris and its region remains the most visited area with a total of 40 million visitors in 1999.

Foreign visitors will pick major cities as primary destinations in France. Paris is the number one choice. Disneyland Paris recently achieved the distinction as the most visited attraction. Visitors also like to spend some time in the country (English, Dutch and German visitors in particular) which explains the development of campgrounds in France.

On a governmental level, tourism infrastructure projects in France are coordinated by three ministries: Ministère de l'Équipement, des Transports et du Logement, Ministère de l'Aménagement du Territoire et de l'Environnement and the Secrétariat d'État au Tourisme. Moreover, France is divided into 22 regions, 96 départements and 36,000 local communities. While they all have their own budgets for tourism they interfere with the ministries in Paris to develop and implement joint ventures, projects and programs. Note also that the Commission of the European Union (EU) subsidizes projects in close coordination with the French Government authorities at all levels.

A profile of the French tourist:

With a five week paid vacation per year, the French have more vacation time than any other Europeans while seventy percent will take a vacation only twenty percent will travel abroad. With the introduction of the thirty-five hour workweek, the French will be encouraged to take more vacations that are shorter in length – three to eight days. The weakness in outbound travel is due to several factors. The most prevalent reason is that a large percentage of the French own secondary residences in France (over 2 million). France in itself is a complete holiday destination, offering a huge variety of tourist attractions. According to a September 2000 survey of 3,000 French households, 24% will take a summer holiday away from home and 51% percent will stay in France and Europe, with a preference for other Mediterranean countries.

The seaside remains a favorite destination for 44 % of the French. This explains the popularity of the French coastal regions, such as Provence Cote d’Azur (PACA) region and Bretagne. The French territories/islands such as Martinique, Guadeloupe, Reunion attracted 950,000 visitors in 2000.

II. TOURISM INFRASTRUCTURE STATUS

Transportation

France's transportation infrastructure is among the most sophisticated in the world, benefiting from advanced technology and large scale investment by the government. The three main entry points for air passengers and airfreight are the Orly and Charles de Gaulle airports in Paris and Lyon's Satolas airport. The construction of a third airport in the Paris region is under study. France has twelve major seaports, many of which are equipped for container ships. There is also an extensive highway and river-transport system and a state-owned rail network (SNCF) that is among the most comprehensive and technologically advanced in the world.

Communications

France’s communications infrastructure is similarly advanced. Telephone lines blanket the country and there is easy access to the Internet via French and foreign service-providers. The French "Minitel" telephone based computer information network is also widespread and provides many consumer services. France is behind the U.S. and some other countries in the use of personal computers and the Internet. However, the government is now trying to promote better use of information technologies.

Lodging/Restaurant

This sector has a consolidated turnover of close to \$ 90 billion, with over 175,000 hotels, 90,800 restaurants, 55,000 cafes, while employing approximately 800,000 people. It is the fourth largest employer after building construction, public works, agriculture, and retail. At the same time there is a great need to improve the quality of hotel properties. The French group, Accor, with \$16 billion in revenues for 1998, is positioning itself as the number one

hotel group in Europe and one of the leaders in the world. Considering the development of the attraction parks (see section III below) over the next ten years, hotels and restaurants will be constructed, improved and/or renovated all around the country. For example, a three-year hotel development plan has been set up for the opening of the Vulcania Parc (located in the Auvergne region) in 2002.

Lodging includes:

- Independent hotels (family type) : approx. 18,500 hotels
- Integrated chain hotels (French and foreign) : approximately 25,000 hotels
- Member of a network : approximately 6,000
- Condominium: approximately 816
- Youth hostels : 215
- Bed & breakfast in private homes (23,000) and farms (over 42,000)
- Campgrounds : 8,356
- Village resorts: 518 (like the French concept Club Med)

Eco-tourism:

There are 36 regional parks, including one in Martinique, as well as 7 national parks, including one in Guadeloupe, in which you find Bed & Breakfasts, as well as hotels.

Spas/resorts:

There are 95 thermal resort cities and over 550,000 customers per year.

Inland waterways:

There are over 5,300 miles of canals with houseboats rental possibilities, 466 harbors and 768,696 licensed boats.

Ski and Mountain sports:

There are 361 alpine ski resorts, with over 4,000 ski lifts. Most of them were developed in the 1960s and 1970s and are currently are in need of maintenance and up-grading.

Golfs:

There are 511 private and public golf courses, 277,460 licensed players and additional 100,000 non-licensed players.

Theme Parks:

List of the top 20 theme parks in France

| Rank | Theme Park | Region | Number of visitors (1999) |
|------|------------|--------|------------------------------|
|------|------------|--------|------------------------------|

| | | | |
|----|---|--------------------------------|-----------|
| 1 | Disneyland | Ile de France | 2,500,000 |
| 2 | Parc Aquaboulevard 4,440,000 | Ile de France | 4,440,000 |
| 3 | Parc Futuroscope | Poitou-Charentes | 2,261,621 |
| 4 | Parc Astérix | Picardie | 2,003,000 |
| 5 | Jardin d'acclimatation | Ile de France | 1,300,000 |
| 6 | Parc Alizé | Centre | 921,073 |
| 7 | Parc Floral de Vincennes | Ile de France | 858,145 |
| 8 | Chemin de fer du Montenvers-Mer De Glace | Rhône Alpes | 823,630 |
| 9 | Géode – Cité de la Villette | Ile de France | 821,877 |
| 10 | Parc animalier de Vincennes | Ile de France | 821,669 |
| 11 | Musée océanographique, Monaco | Provence – Alpes – Côte d'Azur | 775,749 |
| 12 | Parc animalier de la Palmyre | Poitou – Charentes | 673,696 |
| 13 | Parc de loisirs Loisinord | Nord – Pas de Calais | 664,000 |
| 14 | Strasbourg – Visite de la ville en bateau | Alsace | 637,470 |
| 15 | Circuit de Nevers, Magny-Cours | Bourgogne | 595,009 |
| 16 | Parc d'attraction Nigloland, Dolancourt | Champagne – Ardennes | 480,000 |
| 17 | Aquarium de la Rochelle | Poitou – Charente | 463,870 |
| 18 | Park OK Corral, Cuges les Pins | Provence – Alpes – Côte d'Azur | 460,000 |
| 19 | Téléphérique de l'Aiguille du Midi | Rhône – Alpes | 445,624 |
| 20 | Parc la Mer de Sable | Ile de France | |

Historical Sites:

France has 40,000 historic sites, among which 22 have been classified “ World Heritage” by the U.N.E.S.C.O.

World War I & II sites and museums, mostly located in Normandy, generate 2 million visitors per year.

PRINCIPAL TOURISTIC AREAS IN FRANCE

The Ile de France region, which includes Paris, is the most important region for tourism and recreation activities in France, with a 30 percent market share. The region has 200 museums, 2,000 registered historic monuments, 4,000 concerts per year and 80,000 hectares of public green areas. It employs 165,000 people in recreational services and hosts 13 million foreigners every year.

The next two most important regions are Rhone-Alpes with over 12.3 percent market share, mostly concentrated in ski and mountain resorts, and Provence-Alpes-Cote d'Azur with a 10.5 percent market share, mostly concentrated in coastal resorts

III. MAJOR TOURISM INFRASTRUCTURE PROJECTS UNDERWAY IN FRANCE

Railroad Transportation Projects:

- ***Paris-Strasbourg Fast train project:*** The fast train system (TGV) is expanding. New TGV rail projects are being developed to link Paris to Strasbourg, where the European Parliament is headquartered and further to Germany – first phase project valued at \$ 3.14 billion – Completion date: 2006.
- ***Fast train inter-connection network in the South of Paris*** to absorb a passenger traffic that will increase from 2 million now to 7 million in 2010. Estimated cost of the project: \$640 million. Estimated date of completion 2010
- ***New fast train links are also planned with Marseille, Montpellier and Bordeaux*** that will be connected to Paris in less than 3 hours. Completion date: 2020.
- ***Paris train stations:*** Renovation of the five Paris train stations with a total budget of FF 1,6 billion (approx. \$ 266 million)
- ***New railtrack between Lyon in France and Turin in Italy:*** Approved in January 2001 for a total cost of about \$ 10 billion. This will include a new tunnel of 52 kilometers under the Alps. Completion date: 2015.
- ***Mini High Speed Train between Paris and Roissy Charles de Gaulle Airport:*** This project will include 10 kilometers of tunnels and will link “Gare de l’Est’ train station to Roissy in 15 minutes. Estimated date of completion: 2006.
- ***Paris Sub-Urban Train enhancement*** for an estimated cost of \$1.3 billion which will start in 2003.
- ***Mulhouse Streetcar wit extension to the Thur Valley*** will serve Mulhouse and will link the villages of the Thur Valley. Estimated date of completion: 2005.
- Streetcar connnection between Bayonne, France and Saint-Sebastien, Spain to serve a population of 600,000 inhabitants. The project will start in 2003 and its estimated cost will reach USD 57 million.
- ***Bordeaux Streetcar Project:*** A streetcar network 25 kilometers within the city will be operational in 2003 and with an extension to 43 kilometers by year 23006. Total cost estimated at USD 880 million.
- ***High speed TGV train connection between Perpignan and Barcelone*** to be completed by year 2005.
- ***Railroad tunnel (40 kilometers) under the Pyrenees between Lourdes and Sarragosse:*** Estimated completion date: 2020.

- **Mont Blanc Tunnel:** Renovation estimated at USD 250 million.
- **The Mercantour tunnel through the Alps:** Approved in 1993 by both the French and the Italian governments, the 17 km motorway tunnel under the Mercantour mountains will put the Nice region within a three-hour drive from the main cities of Piedmont and Lombard. This direct connection between Piedmont and the Côte d'Azur will encourage business and regional cooperation all along the Turin-Nice-Marseille axis.

Airport Projects:

- **New airport project in the Parisian basin:** Development of a third airport in Paris region, likely to be located in the Picardie Region to absorb the continuing increase in passenger traffic. Final decision to be made in 2001.
- **New International Airport Project on the West Atlantic façade:** Notre-Dame des Landes, located at 30 kilometers north of Nantes will be completed by 2010. Estimated cost: USD 371 million for an annual capacity of 10 million passenger traffic.
- **Airport extension of Lyon-Saint-Exupéry Airport:**
- **Bordeaux Airport extension:** A USD \$71million project over a period of five years.
- **Airport development:** The Nice-Riviera-Airport will undertake a projected investment of USD 40 million a year over a 10-year period to achieve a capacity of 10 million passengers by the year 2006. Over the longer term, the goal of 16 million passengers is expected to be attained in 2015.

Harbors Projects:

- **Euro Mediterranean:** Renovation of the harbor of Marseille (marinas, hotels, restaurants, and shopping centers).
- **West-Atlantic façade - Nantes harbor:** Renovation of the harbor, including marinas, hotels, restaurants, and shopping centers.
- **Mediterranean harbor - Sete Harbor:** Renovation of the harbor, including marinas, hotels, restaurants, and shopping centers.
- **Newhaven Harbor, (East Sussex, England):** 75 percent Newhaven harbor shareholding acquired by the General Council of Seine Maritime, Normandie, France, to restore permanent sea link between the French port Dieppe and Newhaven which was stopped in 1999 by P&O/Stena Line. Estimated number of passenger traffic per year: 1 million. First phase of Newhaven harbor rehabilitation estimated at \$1 million.

- ***Le Havre Port 2000 extension for container ships:*** creation of an additional 4.2 kilometer of banks for a total cost of \$455 million. Starting in mid 2001, project will be completed by 2004.
- ***Fast Ship Container Terminal in Cherbourg*** to connect with Philadelphia for shipping high value added goods.
- ***Le Port de L'Atlantique - Nantes-Saint-Nazaire:*** New harbor infrastructure for containers worth USD 143 million spent over a five year period starting in 2001.

Logistic Platform projects:

- ***Dourges/Delta 3 logisticPlatform Project*** of 300 hectares, for 230 millions of tones of freight transit to serve mail order houses and mass distribution.

Highway infrastructure projects:

- ***Enlargment of A1 highway and bridges between Lille and Dunkerque*** in the North of France.
- ***Lifting Bridge on the Seine river near Rouen***, Normandie - estimated cost: \$ 214 million. Completion date: 2005.
- ***Highway interconnections in the Rouen area*** – Completion date: 2004
- ***Lyon bypass highway project:*** (under consideration).
- Highway connection between Clermont-Ferrand and Bordeaux A 89 will reduce driving transit time from 6hours to 3 hours and half. Completion date: 2006.

Real Estate DownTown Urban Rehabilitation Projects:

- ***Down Town Lyon Urban rehabilitation:*** 150 hectares of Down Town Lyon will be completely rehabilitated with the creation of a marina, sport infrastructure, office and residential buildings and commercial center. This project is programmed to start in 2003, with an estimated date of completion in 2008.

Construction of Convention Centers Projects:

Extended infrastructure for congresses and exhibitions: To meet the constant increase in the number of major international trade fairs held on the Côte d'Azur, additional facilities are being considered to complement existing facilities:

- ***Cannes Festival Palace:*** Palais des Festivals in Cannes (7,000 m2);
- ***Acropolis Convention Center in Nice*** which is the leader in France for hosting scientific and medical meetings and ranks second after Paris for the number of international meetings (50,000 m2);

- ***Cultural and Exhibition Center in Monaco:*** (48,000 m²).

Leisure and Recreational Park Projects:

- ***The Odysseum program:*** The city of Montpellier has decided to build a leisure and commercial park for its population as well as for the national population. The building of a Olympic skating rink, a bowling alley (with 24 lanes), an oceanarium and many stores and businesses will make the Odysseum park one of the most important shopping and leisure centers in Europe, opening new outlets for regional businesses.

Sport Infrastructure Projects:

- ***Renovation of the “Parc des Princes Stadium” in Paris*** conducted by the city of Paris and the subsidiary of Canal plus, Societe d’Exploitation Sports et Evenements.
- ***Car Racing Circuit Project in Lodeve:*** The French federation of car racing is contemplating the project of creating a car racing infrastructure in the former uranium mining complex of Lodeve on a surface of 470 hectares. Estimated cost of the project: \$43 million.

Environmental Projects:

- ***Lac du Bourget water purification and landscape rehabilitation:*** Largest fresh water reserve in France, this rehabilitation project is subsidized by E.U. funds as part of “life environment Program” and is aimed at boosting tourism in the area. Estimated cost: \$147 million.
- ***Reconstitution of the prehistoric caves of “Chauvet”:*** Project will start end of 2001 and will be completed by 2003. Expected number of visitors: 400,000. Total number of visitors in the prehistoric caves in Ardeche reach 1 million visitors per year.

Science or Business Park Projects:

- ***The Massane Park:*** In the suburbs of Montpellier Languedoc-Roussillon Technopole, the economic development of the region will be encouraged by the building of new ***Technopoles*** (Science or Business Parks), such as the Massane Park, which is now under construction.

Garden and Parks:

- ***Garden between Strasbourg and Kehl:*** a 140 hectares garden will be created between Strasbourg and Kehl, along the Rhin. Completion date: 2004.

Resorts Park Projects:

- **Cap d'Agde renovation:** A USD 35 million project for the renovation of this resort located on the Mediterranean coast.

Cruise liner Project:

Queen Mary 2 Cruise liner: will be completed by 2003 by the Chantiers Naval de l'Atlantique for a total cost of USD 714 million.

Attraction and Theme Park Projects:

| <i>Park</i> | <i>Location</i> | <i>Theme</i> | <i>Estimated Budget</i> | <i>Estimated Nbr of Visitors/Year</i> | <i>Status</i> |
|-----------------------|------------------------------|-------------------------------------|---------------------------------|---------------------------------------|--------------------|
| Disneyland | Marne la Vallee, near Paris | Disney Studios | FF 4 billion \$660 million | 4,2 million | Completion In 2002 |
| Jardin Virtuel | Coquelles, North of France | Ecology Environment | FF 700 million | 1,3 million | Pending |
| Euratechnologies | Lille/Lomme, North of France | New Technologies, Numerical Imaging | N/A | N/A | Started |
| Bioscope | Ungersheim Alsace | Bio-technologies | FF 1,6 billion \$228 million | 400,000 | Completion in 2004 |
| Cathedraloscope | Dol de Bretagne | Cathedrals | FF 12 million, \$1.7 million | 50,000 | |
| Cite de la Mer | Cherbourg | Sea | FF138 million \$22 million | | |
| Odysseum | Montpellier | Leisure complex | FF 2,5 billion \$648 million | | In progress |
| Parc Vegetal d'Angers | Angers | Horticulture | FF700 million \$100 million | | Completion in 2004 |
| Merignac | Bordeaux | Aerospace | FF 500 million \$83,3million | | |
| Parc des Ours | Haute Garonne | Wildlife | FF 23 million \$3,8 million | 150,000 | |
| Waliby | Loire Atlantique | Amusement | | | |
| "Grande Decouverte" | Carmaux, Tarn | Mining | FF 500 million \$83,3million | | |

Museum Projects:

- Rehabilitation of the Abbaye of Vaucelles near Cambrai to create a contemporary art museum and restauration of the Villa Cavrois in Croix, near Lille.

Major Event:

Olympic Games 2008: Paris has announced its candidacy for the summer Olympics in 2008. Paris will spend close to FF 100 million (\$16,6 million) for the preparation of the project.

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